

Philippines Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Philippines Seed Market size is estimated at 0.86 billion USD in 2025, and is expected to reach 1.05 billion USD by 2030, growing at a CAGR of 4.08% during the forecast period (2025-2030).

Open-pollinated seeds drive the Philippine seed market due to their lower cost and input requirements, particularly for the majorly produced rice crop

- In 2022, open-pollinated varieties and hybrid derivatives had a higher share of the Philippine seed market. They accounted for 67.9% of the market value. The high share was mainly due to the larger area under rice cultivation (4.8 million hectares), where open-pollinated varieties are most common. Additionally, small farmers highly prefer open-pollinated seed varieties as they require fewer inputs, such as fertilizer and pesticides, and are less expensive than hybrid seeds.
- In 2022, transgenic hybrids accounted for 27.6% of the hybrid seed market due to their higher productivity, wider adaptability, high degree of insect resistance, and herbicide-tolerant characteristics.?
- In the Philippines, out of the total market value of open-pollinated varieties and hybrid derivatives, row crops accounted for 97.7% of the market share in 2022. The high share was due to the increased area under cultivation and the large quantity of seed requirement per unit area for sowing.?
- The hybrid seed segment is estimated to be the fastest-growing seed segment during the forecast period, registering a CAGR of 4.9%. The growth rate is associated with the high productivity of hybrids and the adoption of transgenic hybrids.?
- In the Philippines, adopting hybrids and improved open-pollinated varieties resulted in many advantages, such as self-sufficiency in production, improvement in the quality of agricultural products, stability in production, and high export potential. This, in turn, increased the agricultural landscape of the country.

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- Therefore, the rising adoption of hybrid seeds and the approval of transgenic seeds in the country are anticipated to help drive the seed market's growth during the forecast period. ?

Philippines Seed Market Trends

Rice accounted for the largest share of cultivation area in the Philippines, driven by its consistent demand as a staple crop

- The Philippines has a diverse range of row crops cultivated across the country. It dedicated 7.7 million hectares to row crop cultivation, which accounted for 87.4% of the total cultivation area in the country in 2022. There is a rising demand for row crops in the country due to demand from international and domestic markets. As a result, the cultivation area of row crops in the country increased by 0.8% between 2017 and 2022.
- Grains and cereals are the largest segment by cultivation area. They accounted for 96.0% of the overall row crops cultivation area in 2022. The area under the grains and cereals increased by 0.8% between 2017 and 2022, owing to the rise in demand from local and international markets for row crops, driven by domestic consumption and export opportunities. Rice is the major row crop grown in the Philippines. The area under rice cultivation accounted for 62.6% of the total area for row crops in 2022, which increased from 4.81 million hectares in 2017 to 4.83 million hectares in 2022. This is because rice is a staple food in the country, and the continuous demand for rice to meet daily nutritional needs drives the expansion of rice cultivation. At the same time, the area under corn cultivation increased from 2.55 million hectares in 2017 to 2.58 million hectares in 2022 due to the increased demand for corn in the feed and food industries.
- Adopting modern agricultural techniques, such as improved irrigation methods, using high-yield varieties, and applying better pest and disease management practices are attracting row crop farming in the country. Therefore, the growing demand from international and domestic markets is estimated to drive the country's expansion of row crop cultivation acreage.

Carrot and pea cultivation in the country experienced a significant rise in seed adoption, with traits such as disease resistance and quality attributes being highly preferred

- Carrot is one of the essential brassicas grown widely in the Philippines. Varieties with quality traits such as size, shape, and color of the carrot, disease resistance, early maturing, heat tolerance, long storage capacity, and high carotene pigmentation are the major cultivated traits in the country.? There is a high demand for good skin colors such as orange, yellow, and white, resistant to the Alternaria blight disease. Bayer AG and Syngenta AG offer seed varieties that help in uniformity, bolting tolerance, producing different colors, and broader adaptability with varying soil conditions. Furthermore, wider adaptability is a major trait for both crops due to changes in weather and soil conditions and the demand for high yield during unfavorable situations.
- Peas are another major vegetable in the unclassified vegetable segment. Varieties with disease resistance (especially to powdery mildew and rusts), tolerance to abiotic conditions such as temperature variations, and other quality traits such as the size of the pod, the number of pods, and early, mid, and late season cultivars, are primarily preferred.? Bayer AG offers the product brand Seminis with the ability to resist bean yellow mosaic virus and powdery mildew. Additionally, the Seminis brand offers uniformity, sweetness, smoothness, and stringless pods for higher yearly yields.
- Quality attributes have the highest demand among carrot growers to fetch higher prices, and disease resistance is preferred by

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the peas-producing farmers for high yield and lower crop losses. Therefore, these trends are expected to help the growth of the vegetable seeds market, especially carrots and peas, during the forecast period.

Philippines Seed Industry Overview

The Philippines Seed Market is fragmented, with the top five companies occupying 16.05%. The major players in this market are Allied Botanical Corporation, Bayer AG, Charoen Pokphand Group (CP Group), Corteva Agriscience and Syngenta Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Area Under Cultivation

4.1.1 Row Crops

4.1.2 Vegetables

4.2 Most Popular Traits

4.2.1 Carrot & Peas

4.2.2 Rice & Corn

4.2.3 Tomato, Pumpkin & Squash

4.3 Breeding Techniques

4.3.1 Row Crops & Vegetables

4.4 Regulatory Framework

4.5 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

5.1 Breeding Technology

5.1.1 Hybrids

5.1.1.1 Non-Transgenic Hybrids

5.1.1.2 Transgenic Hybrids

5.1.1.2.1 Herbicide Tolerant Hybrids

5.1.1.2.2 Insect Resistant Hybrids

5.1.1.2.3 Other Traits

5.1.2 Open Pollinated Varieties & Hybrid Derivatives

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- 5.2 Cultivation Mechanism
 - 5.2.1 Open Field
 - 5.2.2 Protected Cultivation
- 5.3 Crop Type
 - 5.3.1 Row Crops
 - 5.3.1.1 Fiber Crops
 - 5.3.1.1.1 Cotton
 - 5.3.1.1.2 Other Fiber Crops
 - 5.3.1.2 Forage Crops
 - 5.3.1.2.1 Alfalfa
 - 5.3.1.2.2 Forage Corn
 - 5.3.1.2.3 Forage Sorghum
 - 5.3.1.2.4 Other Forage Crops
 - 5.3.1.3 Grains & Cereals
 - 5.3.1.3.1 Corn
 - 5.3.1.3.2 Rice
 - 5.3.1.3.3 Sorghum
 - 5.3.1.4 Oilseeds
 - 5.3.1.4.1 Soybean
 - 5.3.1.4.2 Other Oilseeds
 - 5.3.1.5 Pulses
 - 5.3.2 Vegetables
 - 5.3.2.1 Brassicas
 - 5.3.2.1.1 Cabbage
 - 5.3.2.1.2 Carrot
 - 5.3.2.1.3 Cauliflower & Broccoli
 - 5.3.2.1.4 Other Brassicas
 - 5.3.2.2 Cucurbits
 - 5.3.2.2.1 Cucumber & Gherkin
 - 5.3.2.2.2 Pumpkin & Squash
 - 5.3.2.2.3 Other Cucurbits
 - 5.3.2.3 Roots & Bulbs
 - 5.3.2.3.1 Garlic
 - 5.3.2.3.2 Onion
 - 5.3.2.3.3 Potato
 - 5.3.2.3.4 Other Roots & Bulbs
 - 5.3.2.4 Solanaceae
 - 5.3.2.4.1 Chilli
 - 5.3.2.4.2 Eggplant
 - 5.3.2.4.3 Tomato
 - 5.3.2.4.4 Other Solanaceae
 - 5.3.2.5 Unclassified Vegetables
 - 5.3.2.5.1 Asparagus
 - 5.3.2.5.2 Lettuce
 - 5.3.2.5.3 Okra
 - 5.3.2.5.4 Peas
 - 5.3.2.5.5 Spinach

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5.3.2.5.6 Other Unclassified Vegetables

6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

6.2 Market Share Analysis

6.3 Company Landscape

6.4 Company Profiles

6.4.1 Allied Botanical Corporation

6.4.2 Bayer AG

6.4.3 Charoen Pokphand Group (CP Group)

6.4.4 Corteva Agriscience

6.4.5 DCM Shriram Ltd (Bioseed)

6.4.6 East-West Seed

6.4.7 Harbest Agribusiness Corporation

6.4.8 Rijk Zwaan Zaadteelt en Zaadhandel BV

6.4.9 SeedWorks International Pvt. Ltd

6.4.10 Syngenta Group

7 KEY STRATEGIC QUESTIONS FOR SEEDS CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Global Market Size and DROs

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

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